

A CHECKLIST FROM CLD PARTNERS

HOW TO AVOID **COMMON PITFALLS** OF A FINANCIALFORCE IMPLEMENTATION



Over the past 10 years, CLD Partners has helped over 150 enterprise clients across multiple industries implement the FinancialForce ERP. We've seen what makes an implementation successful and what pitfalls create headaches down the road.

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CLOUD ERP. REALIZED.

CHECKLIST OF COMMON PITFALLS

If you're considering implementing the FinancialForce ERP (or even if you have already) you can use this checklist as a guide for getting it right. And if you'd like extra support putting these tips into practice, don't hesitate to reach out to our implementation experts.



Let's Dig In.

Questions about your implementation? Call CLD Partners at (571) 406-4610 for a free initial consultation.

Implementation Pitfalls

#1 Project Execution Pitfalls

1. Not engaging all the stakeholders at the beginning of the project
2. Underestimating the time investment needed from key stakeholders & resources
3. Not clearly understanding decision making structure (boards) or processes
4. Underestimating the time needed for decision making
5. Overlooking downstream or upstream system impacts
6. Incomplete requirements before design
7. No representation from other geographies or business units during design
8. Low engagement from those participating in design
9. Not having a dedicated environment for the FinancialForce project

#2 End to End Solution & Integration Pitfalls

10. Only focusing on part of the solution
11. Trying to over-automate or over-complicate the solution
12. Making too many changes at one time
13. Misalignment of Core Enterprise Processes that interact with FinancialForce

#3 Training & Change Management Pitfalls

14. Not providing up front training to stakeholders on what FinancialForce can do
15. Not having a clear mandate that users must move to the new system
16. Not preparing a training environment or plan for end user training
17. Not communicating to users about the new implementation
18. Assuming that the internal training team will be able to develop training

#4 Testing Pitfalls

19. Poor test preparation/management (Not Writing Test Cases)
20. Shortening Time for User Acceptance Testing if the schedule slips
21. Not Training Testers on the environment prior to testing
22. Not conducting System Integration Testing for Integrations

5 Data Migration Pitfalls

23. Underestimating time it takes or the transformation that will be needed to migrate data
24. Thinking that it can be handled independently of the solution design
25. Waiting too long to start Data Migration Planning and Tasks
26. Assuming that the source data won't need to be cleaned manually
27. Assuming that the source data contains all the necessary information for PSA (it usually doesn't and this means that you will have to make decisions about how to supply that "missing" data.)

Implementation Best Practices

#1 Project Execution Recommendations

1. When possible, identify one leader / decision maker
2. Identify the stakeholders that will be affected by the change
3. Set expectations for participation and confirm project schedule is realistic
4. Engage all your stakeholders up front
5. Invite stakeholders to design sessions & design review
6. Have a dedicated development environment for the FinancialForce implementation

#2 End to End Solution & Integration Pitfalls

7. Understand how FinancialForce will integrate with your CRM and/or CPQ Solution
8. Think about how PSA and revenue recognition processes will sync
9. Determine how you will bill & invoice clients
10. If you're not sure how it should work, consider postponing automation
11. Be wary of over customizing your solution

#3 Training and Change Management Recommendations

12. Train the core project team up front on what FinancialForce can do
13. Create a simple Change Management Plan
14. Communicate regularly with end users at key milestones
15. Try not to over complicate the end user experience
16. Be willing to re-engineer a process

#4 Testing Recommendations

17. Write Test Cases
18. Determine which environment to use for testing
19. Identify Testers and ensure that all necessary roles and stakeholders are represented
20. Plan for staging data to support testing
21. Set & manage user expectations (define how user feedback will be addressed)
22. Ensure there enough time set aside for testing

#5 Data Migration Recommendations

23. Develop a Data Migration Strategy at the beginning of the Project
24. Don't wait to look at what data you want to migrate over
25. Create a field level mapping plan for data migration

THE RIGHT FINANCIALFORCE IMPLEMENTATION PARTNER MATTERS.

FIND OUT WHAT YOU NEED TO
LOOK FOR, ASK FOR, AND EXPECT
FROM YOUR PROFESSIONAL
SERVICES TEAM—EVEN IF YOU
DON'T CHOOSE US.

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CONTACT US

(571) 406-4610
cldpartners.com